Australian National University

CI Financial Exception Dashboard

User Manual

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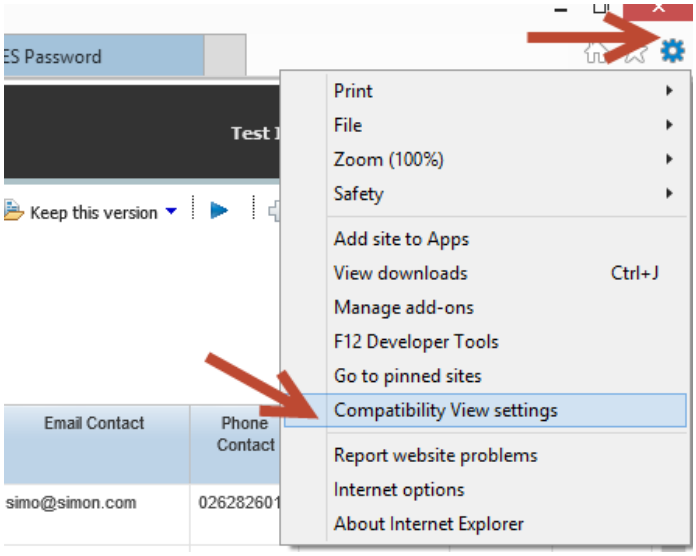
THE CI FINANCIAL EXCEPTION DASHBOARD

The CI Financial Exception Dashboard provides finance managers with high-level summaries of chief investigator financial data using a set of tables and figures. The dashboard also allows finance managers to explore project details using drill-through reports.

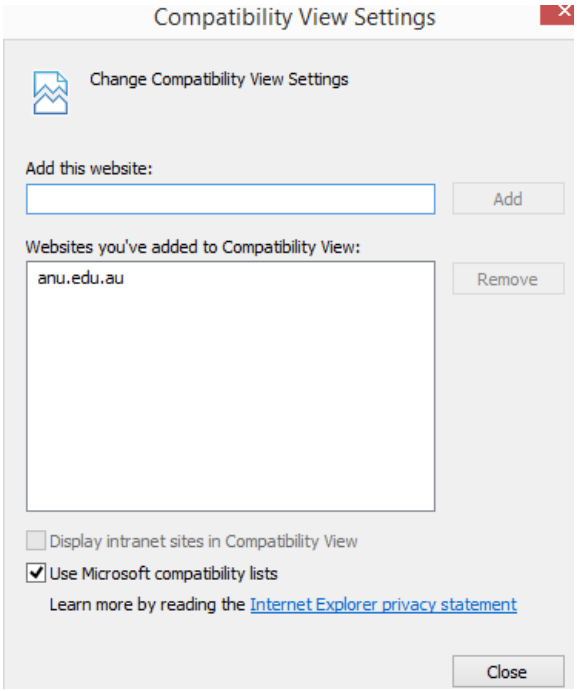
ACCESSING ANU INSIGHT

Important

If you are using Internet Explorer, please make sure that Compatibility View is turned ON. To do so:



And add anu.edu.au to the list:



Logging into ANU Insight

The CI Financial Exception Dashboard is accessed via ANU Insight:

https://insight.anu.edu.au

Single sign-on has been enabled so most users will be automatically directed to the portal page without the need to provide login credentials.

***Hint**: The single sign-on may not work and an error message may appear if you have signed into other ANU enterprise systems (e.g. HRMS) or local intranet with a different domain to UDS (e.g. CBE\u1234567 instead of UDS\u1234567) using the same browser session. Please sign out and close all browser windows to clear existing credentials, open a new browser window and then visit https://insight.anu.edu.au again.*

A small number of users may be prompted to enter a username and password as a result of their network configurations or the browser they are using. If you are one of the few users affected, please log in with your UDS/HORUS user ID and password in the following format:

User Name:	**UDS**User ID *(e.g. UDS\u1234567)*
Password:	Your UDS/HORUS password

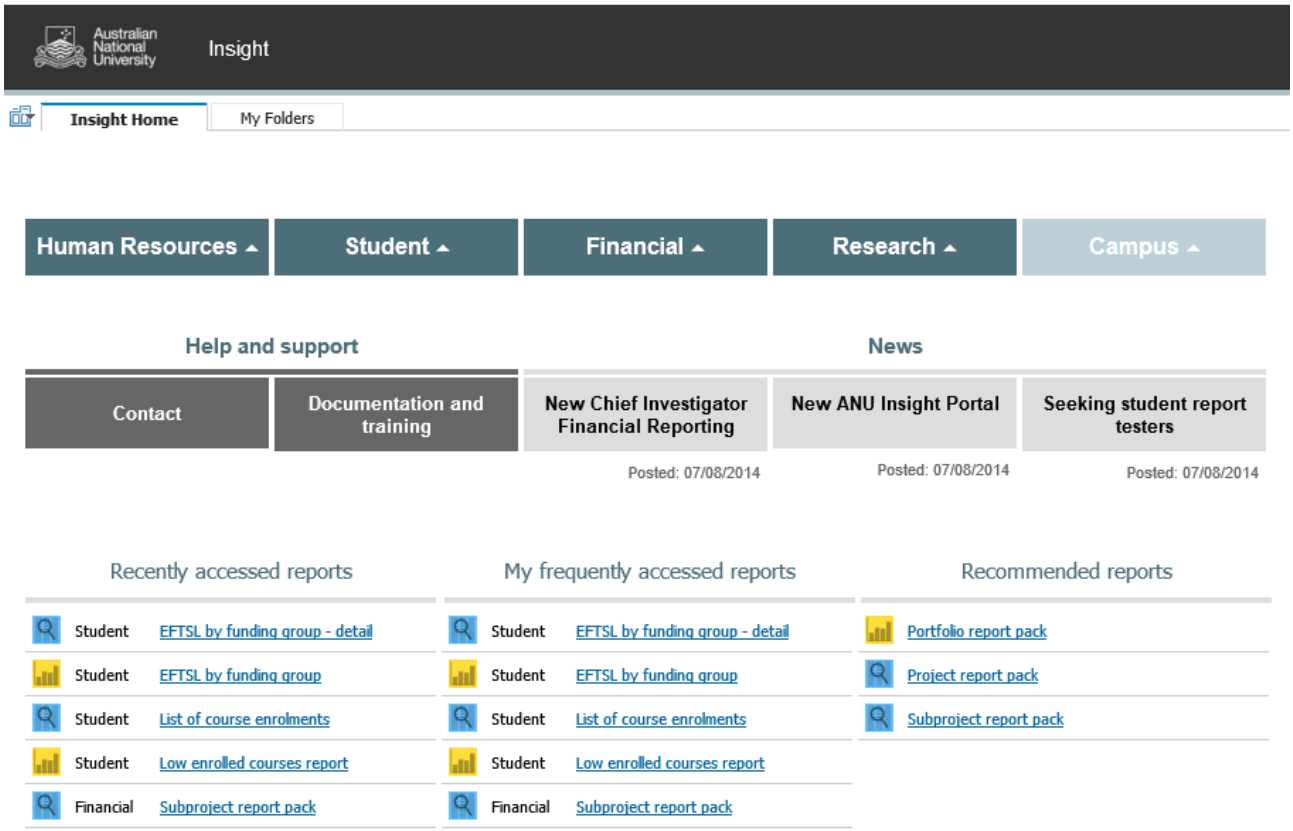
Step by step instructions on how to do this can be found here How to log into ANU Insight. If you are experiencing issues please contact the ANU Insight team on team via:

Email: insight@anu.edu.au
Phone: +61 2 6125 8649

NAVIGATING TO THE DASHBOARD

The Insight Homepage

When you first access ANU Insight, you will be directed to the portal home page:



The portal is available and has been tested on Mac, PC and mobile devices and for different versions of various web browsers. However, if you experience any issues in terms of how the portal renders or functions, please contact us on insight@anu.edu.au. For a full list of supported web browsers, please refer to the frequently asked questions at FAQ ANU Insight.

Detailed information on how to navigate all the functionalities available to ANU Insight users is available at http://unistats.anu.edu.au/anu-insight/.

Navigating to the CI Financial Exception Dashboard

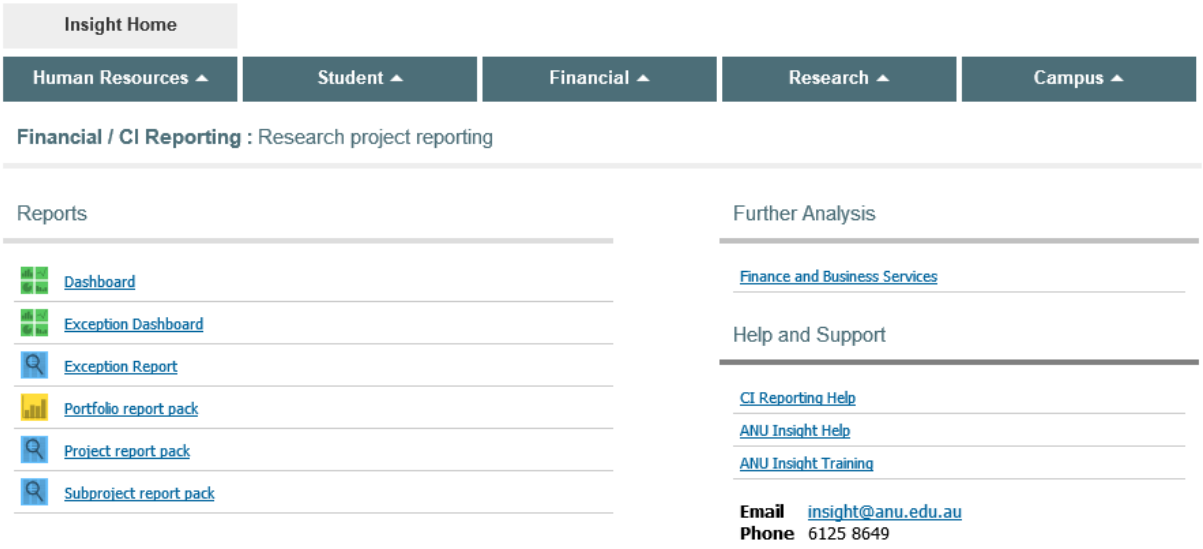
The navigation menu shown below is how you navigate to dashboard.

To access the CI Financial Exception Dashboard, *left click once* on the Financial menu header on the navigation menu:

This would open and display the Financial submenu:

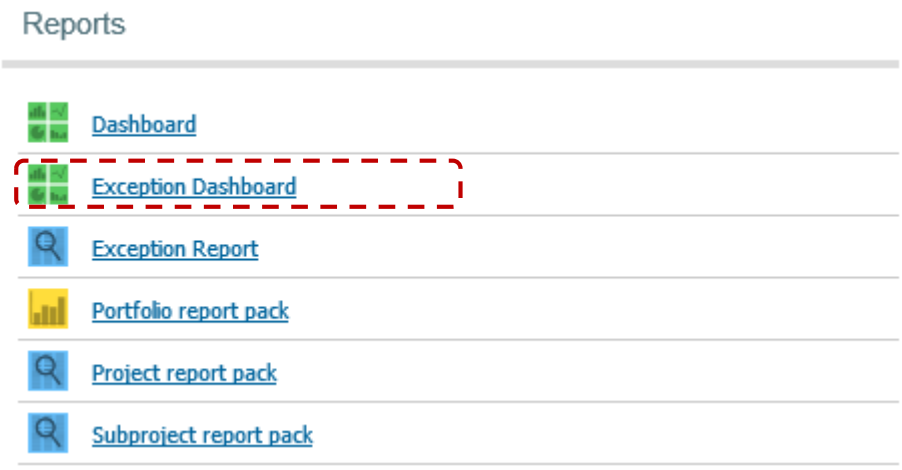
The CI Financial Exception Dashboard can be found on the CI Reporting page. *Left click once* on the submenu item called CI Reporting:

This would take you to the CI Reporting page:



Initiating the Dashboard

The CI Financial Exception Dashboard can be found in the Reports section on the left hand side of the screen.

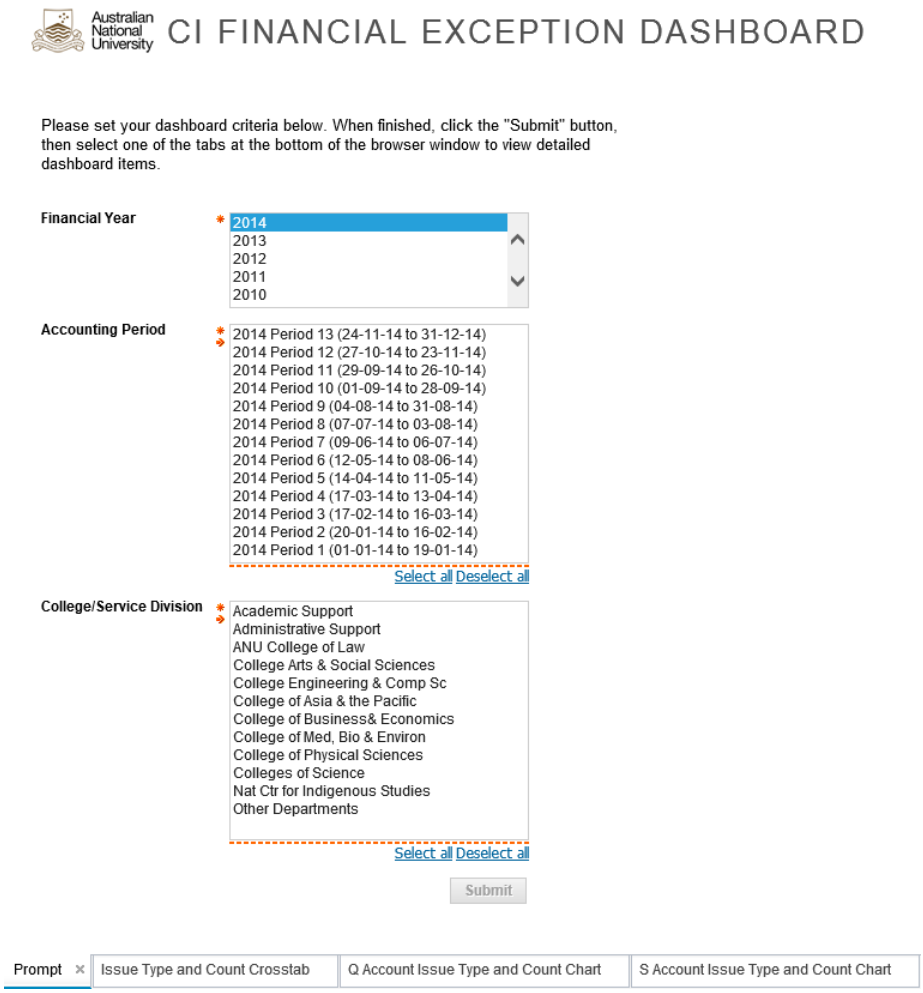


To initiate the CI Financial Exception Dashboard, *left click once* on the dashboard name.

USING THE DASHBOARD

The Prompt Page

The first thing you will see after initiating the dashboard is a tab that asks for user inputs. This tab is called the “Criteria” and it is designed to allow you to specify your criteria for running the CI Financial Exception Dashboard:


Australian National University
CI FINANCIAL EXCEPTION DASHBOARD
Please set your dashboard criteria below. When finished, click the "Submit" button, then select one of the tabs at the bottom of the browser window to view detailed dashboard items.
Financial Year
2014
2013
2012
2011
2010
Accounting Period
2014 Period 13 (24-11-14 to 31-12-14)
2014 Period 12 (27-10-14 to 23-11-14)
2014 Period 11 (29-09-14 to 26-10-14)
2014 Period 10 (01-09-14 to 28-09-14)
2014 Period 9 (04-08-14 to 31-08-14)
2014 Period 8 (07-07-14 to 03-08-14)
2014 Period 7 (09-06-14 to 06-07-14)
2014 Period 6 (12-05-14 to 08-06-14)
2014 Period 5 (14-04-14 to 11-05-14)
2014 Period 4 (17-03-14 to 13-04-14)
2014 Period 3 (17-02-14 to 16-03-14)
2014 Period 2 (20-01-14 to 16-02-14)
2014 Period 1 (01-01-14 to 19-01-14)
Select all Deselect all
College/Service Division
Academic Support
Administrative Support
ANU College of Law
College Arts & Social Sciences
College Engineering & Comp Sc
College of Asia & the Pacific
College of Business& Economics
College of Med, Bio & Environ
College of Physical Sciences
Colleges of Science
Nat Ctr for Indigenous Studies
Other Departments
Select all Deselect all
Submit
Prompt
Issue Type and Count Crosstab
Q Account Issue Type and Count Chart
S Account Issue Type and Count Chart

Step 1: Select a Financial Year

This is a compulsory step.

The CI Financial Exception Dashboard is run for a specific financial year. Therefore, you must tell the dashboard which financial year to run for.

Step 2: Select One or More Accounting Periods

This is a compulsory step.

The CI Financial Exception Dashboard is run for one or more accounting periods. Therefore, you must tell the dashboard which accounting period(s) to run for.

To select more than one accounting period, press *Ctrl* (PC) or *Command* (Mac) on your keyboard and *left click once* on each of the preferred periods. If you are selecting a consecutive number of periods, press *Shift* on your keyboard and *left click once* on the starting year (ending year), then *left click once* on the ending year (starting year). You do not need to press *Ctrl* (PC), *Command* (Mac) or *Shift* while scrolling up or down.

Step 3: Select an Area

This is a compulsory step.

The CI Financial Exception Dashboard is run for one or more area. Therefore, you must tell the dashboard which area(s) to run for.

To select more than one accounting period, press *Ctrl* (PC) or *Command* (Mac) on your keyboard and *left click once* on each of the preferred areas. If you are selecting a consecutive number of areas, press *Shift* on your keyboard and *left click once* on the starting year (ending year), then *left click once* on the ending year (starting year). You do not need to press *Ctrl* (PC), *Command* (Mac) or *Shift* while scrolling up or down.

Step 4: Submit Criteria

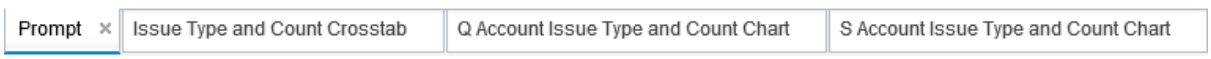
When all required options have been selected, you can *left click once* the “Submit” button at the bottom of the Criteria tab to run the dashboard.

Important

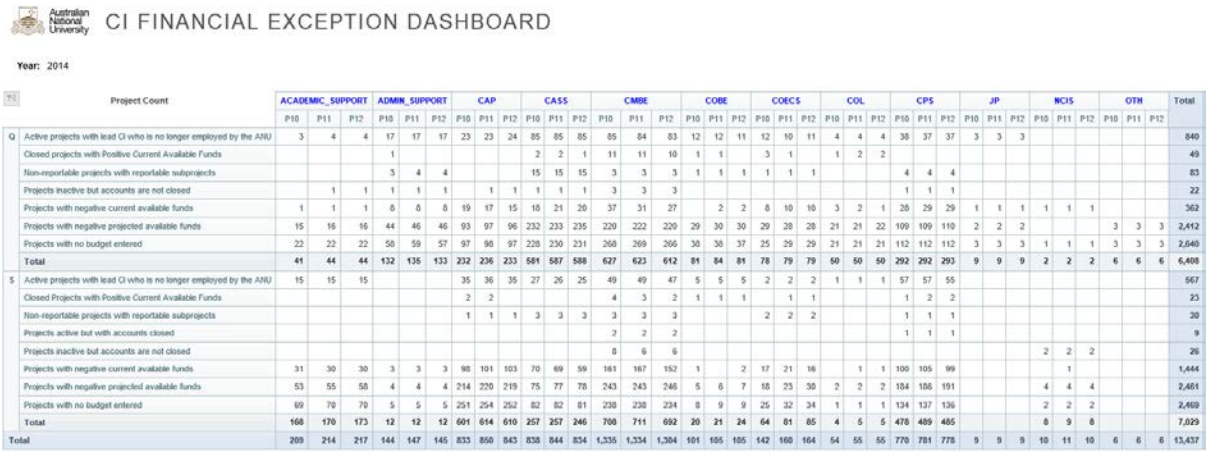
The Submit button

must be pressed before the dashboard can be run. The Submit button will remain greyed out until all required prompts have valid values selected.

After clicking the Finish button, select one of the tabs (other than the Criteria tab) at the bottom of the browser window to continue:



The Issue Type and Count Crosstab Tab


CI FINANCIAL EXCEPTION DASHBOARD

Year: 2014

	Project Count	ACADEMIC_SUPPORT			ADMIN_SUPPORT			CAP			CASS			CMBE			COBE			COECS			COL			CPS			JP			NCIS			OTH			Total
		P10	P11	P12	P10	P11	P12	P10	P11	P12	P10	P11	P12	P10	P11	P12	P10	P11	P12	P10	P11	P12	P10	P11	P12	P10	P11	P12	P10	P11	P12	P10	P11	P12	P10	P11	P12	
Q	Active projects with lead CI who is no longer employed by the ANU	3	4	4	17	17	17	23	23	24	85	85	85	85	84	83	12	12	11	12	10	11	4	4	4	38	37	37	3	3	3							840
	Closed projects with Positive Current Available Funds				1						2	2	1	11	11	10	1	1		3	1		1	2	2													49
	Non-reportable projects with reportable subprojects				3	4	4				15	15	15	3	3	3	1	1	1	1	1	1				4	4	4										83
	Projects inactive but accounts are not closed		1	1	1	1	1		1	1	1	1	1	3	3	3										1	1	1										22
	Projects with negative current available funds	1	1	1	8	8	8	19	17	15	18	21	20	37	31	27		2	2	8	10	10	3	2	1	28	29	29	1	1	1	1	1	1				362
	Projects with negative projected available funds	15	16	16	44	46	46	93	97	96	232	233	235	220	222	220	29	30	30	29	28	28	21	21	22	109	109	110	2	2	2				3	3	3	2,412
	Projects with no budget entered	22	22	22	58	59	57	97	96	97	228	230	231	268	269	266	36	36	37	25	29	29	21	21	21	112	112	112	3	3	3	1	1	1	3	3	3	2,640
	Total	**41**	**44**	**44**	**132**	**135**	**133**	**232**	**236**	**233**	**581**	**587**	**588**	**627**	**623**	**612**	**81**	**84**	**81**	**78**	**79**	**79**	**50**	**50**	**50**	**292**	**292**	**293**	**9**	**9**	**9**	**2**	**2**	**2**	**6**	**6**	**6**	**6,408**
S	Active projects with lead CI who is no longer employed by the ANU	15	15	15				35	36	35	27	26	25	49	49	47	5	5	5	2	2	2	1	1	1	57	57	55										567
	Closed Projects with Positive Current Available Funds							2	2					4	3	2	1	1	1		1	1				1	2	2										23
	Non-reportable projects with reportable subprojects							1	1	1	3	3	3	3	3	3				2	2	2				1	1	1										30
	Projects active but with accounts closed													2	2	2										1	1	1										9
	Projects inactive but accounts are not closed													8	9	9																2	2	2				26
	Projects with negative current available funds	31	30	30	3	3	3	98	101	103	70	69	59	161	167	152	1		2	17	21	16		1	1	100	105	99					1					1,444
	Projects with negative projected available funds	53	55	58	4	4	4	214	220	219	75	77	78	243	243	246	5	6	7	18	23	30	2	2	2	184	186	191				4	4	4				2,461
	Projects with no budget entered	69	70	70	5	5	5	251	254	252	82	82	81	238	238	234	8	9	9	25	32	34	1	1	1	134	137	136				2	2	2				2,469
	Total	**168**	**170**	**173**	**12**	**12**	**12**	**601**	**614**	**610**	**257**	**257**	**246**	**708**	**711**	**692**	**20**	**21**	**24**	**64**	**81**	**85**	**4**	**5**	**5**	**478**	**489**	**485**				**8**	**9**	**8**				**7,029**
Total		**209**	**214**	**217**	**144**	**147**	**145**	**833**	**850**	**843**	**838**	**844**	**834**	**1,335**	**1,334**	**1,304**	**101**	**105**	**105**	**142**	**160**	**164**	**54**	**55**	**55**	**770**	**781**	**778**	**9**	**9**	**9**	**10**	**11**	**10**	**6**	**6**	**6**	**13,437**

This tab contains a crosstab for financial exception issue types and areas, grouped by fund types (Q and S).

***Hint**: To view a detailed list of projects for a financial exception issue type, run the CI Financial Exception Report. The link to the report can be found on the CI Reporting page.*

The column headers of the crosstab have drill-through enabled to allow detailed graphical inspection of the trends for each area's financial exception issues.

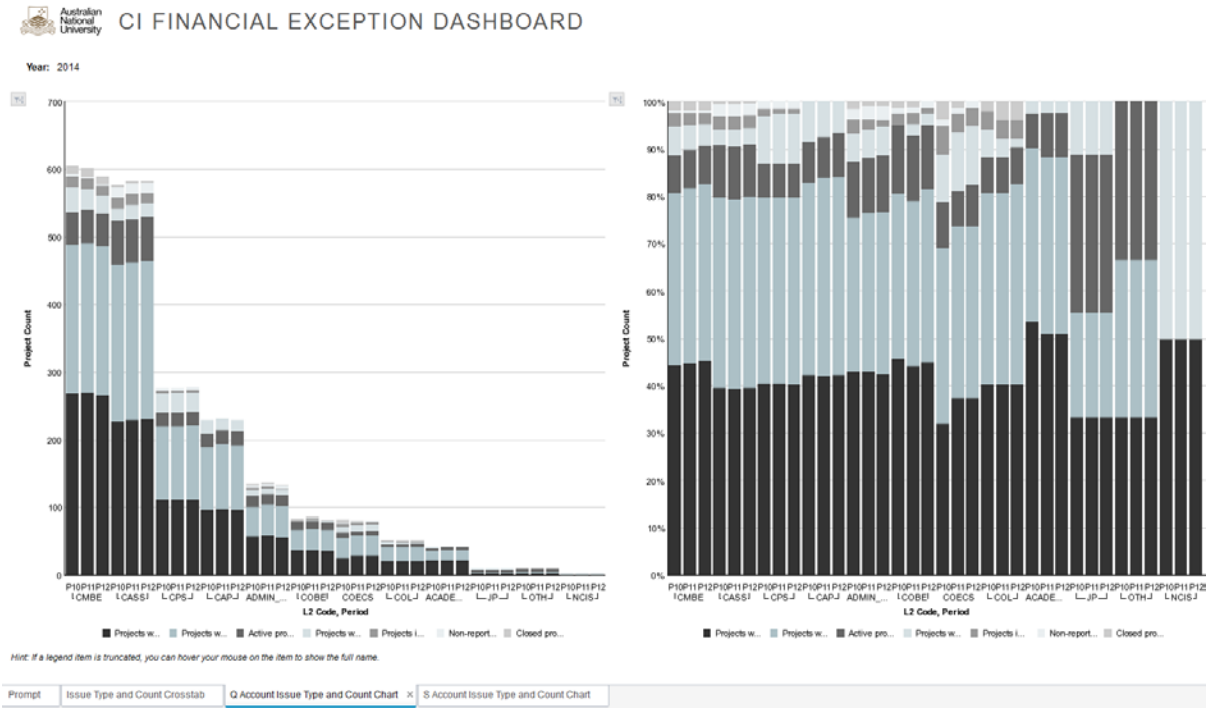
To drill through to the graphical detail report, hover your mouse pointer on one of the column headers. The mouse pointer will turn from an arrow into a hand. *Left click once* the column header:

The graphical detail report will be opened in a new browser window/tab:

If your screen resolution is low, you may need to scroll right and/or down to see all figures.

If a financial exception issue type has zero counts (i.e. no issue found), the corresponding figure will be replaced by “No Data Available”.

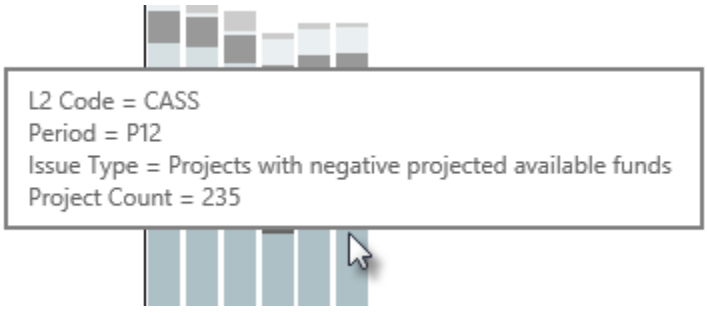
The Account Issue Type and Count Chart Tabs (Q and S)


CI FINANCIAL EXCEPTION DASHBOARD
Year: 2014
Project Count
L2 Code, Period
Hint: If a legend item is truncated, you can hover your mouse on the item to show the full name.
Prompt
Issue Type and Count Crosstab
Q Account Issue Type and Count Chart
S Account Issue Type and Count Chart

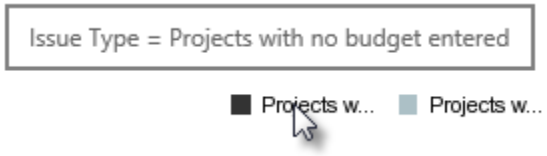
The only difference between the Q Account Issue Type and Count Chart tab and the S Account Issue Type and Count Chart tab is that one is for Q funds while the other is for S funds. The two tabs are the same otherwise.

There are two figures in each tab. The figure on the left shows financial exception counts in absolute numbers, whereas the figure on the right shows financial exception counts in relative percentages.

To view detailed information for a band, hover your mouse on one of the bands:



If a legend item is truncated, you can hover your mouse on the item to show the full name:



Additional Functionalities

Once the dashboard is run, you can print any tab of the dashboard and export tables or figures.

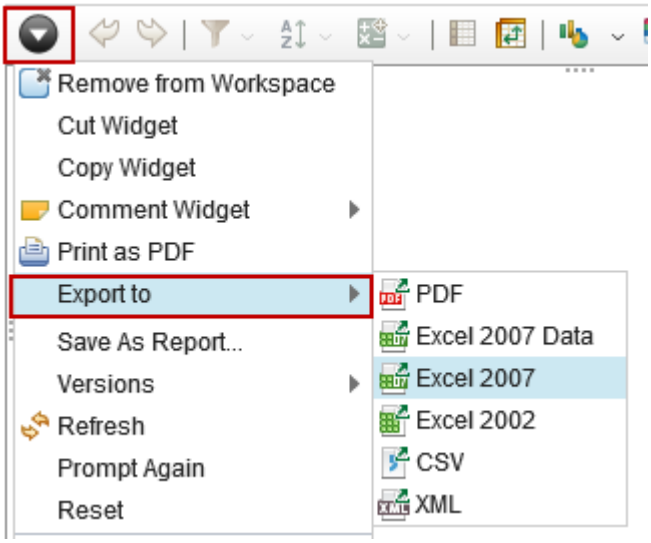
Printing the Dashboard

To print a dashboard tab, press the printer icon at the top of the browser window and follow the instructions:

Exporting Tables and Figures

To export tables and figures in the dashboard to PDF or Excel files, *left click once* on the table or figure that you want to export. A menu will appear on top of the table or figure:

Left click once the leftmost icon on the menu and select “Export to”:



- To export the table or figure to a PDF file, select the “PDF” option.
- To export the table of figure to an Excel file, select the “Excel 2007” option. “Excel 2002” option can also be selected for compatibility reasons.
- To export the underlying data supporting the table of figure, select the “CSV” option.

***Note**: Tables and figures cannot be exported using the “Excel 2007 Data” option. If you do so an error message will occur.*